14 Enter a SAR – Physician/ Allied Provider

Introduction to Enter a SAR – Physician/ Allied Provider

The step-by-step instructions to "Enter a SAR" with a physician as the service provider is described in this section.

Whether the physician is an admitting physician at a hospital or performing services for a client outside of a hospital, the process to enter a SAR is the same.

Similarly when the service provider is an allied provider, *the process for entering the SAR is exactly the same*. The only difference is that the user will need to specify an allied provider rather than a physician as the service provider when entering a SAR.

Objectives

At the completion of this section, you will be able to:

- Enter a SAR with a physician as the service provider
- Add service codes and service groupings
- "Submit" the SAR for validation

14.1 Find the Client

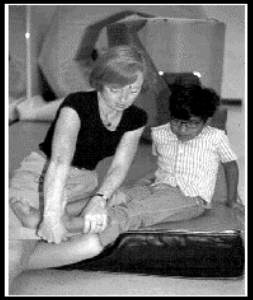1. Access Service Authorization Request by clicking the "Authorization" link.

2. Enter search criteria in the "By Client" area:
3. Click the "Search" button.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Search - Service Authorization

BY CLIENT

CCS Number		Client Name	TESTA,B
Date of Birth	Mon ▼ Day ▼ Year ▼	Gender	Select ▼
Client Index Number		Legal County	San Diego ▼
SSN			

BY PROVIDER

○ Hospital / Medical Provider ○ Special Care Centers ○ Dental Provider

Provider Name		find ▶	Provider ID		find ▶
Service Begin Date	Mon ▼ Day ▼ Year ▼	Service End Date	Mon ▼ Day ▼ Year ▼
SAR Status	Select ▼		

BY SAR NUMBER

SAR Number [   ]

Step 3 ➤ Search   Clear

An example of searching for the client by name and county.

Partial searches by name are permitted [Last Name, First Name].

Field descriptions are provided in CMS Net Web Online Help.

4. Click the "Select" radio button for the desired client.   If an <u>exact match</u> is found, the option button will be pre-selected.
5. Then click the "Add SAR" button.

> If the client is not listed, click the "Authorization" link located above the blue banner to return to the Search SAR page.

> Field descriptions are provided in CMS Net Web Online Help.

14.2 Select a Provider for the SAR

1. Click the "Hospital/Medical Provider" radio button.
2. Enter provider search information.
3. Click the "Search" button.

You may search for the provider by Provider ID.

California Home   CDHS Home   CDHS Comments   CDHS Search   CDHS Organization   Thursday, April 8, 2004

Children's Medical Services
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Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Search - Providers

Required fields are marked i

Step 1

SEARCH PROVIDER

Search Category *   ⊙ Hospital / Medical Provider   ○ Special Care Centers   ○ Dental Provider

Provider Name   [   ]   Provider ID [FS4901334]

Specialty/Allied Health   [Select   ▼]

Special Care Center Type   [Select   ]

County   [Select   ▼]

Provider Type   [Select   ▼]

Step 3   → [Search] [Clear]

Provider ID for hospital or medical providers is 9 characters. You may enter 8 characters to search.

To search for the physician by Provider Name, enter:

Last Name,First Name
Partial searches are permitted.

The "Provider Type" drop-down applies only to Hospital/ Medical providers.

To select a dental provider for a SAR, click the "Dental Provider" radio button and use search criteria (such as the Denti-Cal number in the Provider ID field, provider name, or the county).

To select a Special Care Center for a SAR, click the "Special Care Center" radio button and use search criteria.

Field descriptions are provided in CMS Net Web Online Help.

4. Confirm that for individual medical providers, the provider is paneled (look for a "Yes" in the Paneled column.
5. Click on the link (blue underlined name of your selection).
6. If additional matches are supplied, view them on the next page by:
   Clicking the "Next Records" link OR clicking the "Prev Records" link.

7. You may enter the provider information in order to <u>DENY</u> an authorization.
8. Click the "Continue" button.

Confirm that the individual medical provider is paneled.

You may enter provider information only to **DENY** the SAR.

SARs cannot be issued to group providers, such as Group Certified Family/ Pediatric Nurse Practitioners, Physicians Groups, Group Optometrists, Medicare Crossover Provider Only, and Group Respiratory Care Practitioners. You must authorize the provider's individual or (rendering) provider ID number.

Field descriptions are provided in CMS Net Web Online Help.

14.3 Enter SAR Information

1. Enter SAR Information.
2. Click the "Add Services" button to search for service codes.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Enter SAR

FRANCISCO CARLOS CHAVEZ III, 3331366

Required fields are marked in *

CLIENT INFORMATION

Client Name:	FRANCISCO CARLOS CHAVEZ III	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
CCS Number:	3331366	Med Elig Status:	ELIGIBLE	Application Status:	SIGNED APP
Date of Birth:	02/04/1984	Diagnostic Only:	NO	PSA Status:	SIGNED
CIN:	97461633C5	CCS Elig Status:	9N CCS-M/C ONLY	Program Begin Date:	12/18/2002
Gender:	MALE	County:	KINGS	Program End Date:	12/18/2004

PROVIDER INFORMATION

Provider Name:	TETZLAFF, THOMAS R MD	Provider Number:	FS4901334
Address:	75 PRINGLE WAY,STE 801,RENO,NV,89502-8400	County:	

SAR INFORMATION

SAR Number   SAR Status

Service Begin Date * [Jul] [1] [2004] Service End Date [Dec] [18] [2004]

Service Request Date * [Jun] [30] [2004] Number of Days [ ]

EPSDT-SS   ☐   Category [Select]

CCS SS   ☐   State Approved ○ Yes ○ No

State Funded   ☐

Primary Diagnosis* [244.9 UNSPECIFIED HYPOTHYROIDISM] find ▸

Secondary Diagnosis [ ] find ▸

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount

SPECIAL INSTRUCTIONS

[ ]

Add Services **Submit** **Undo**

> Please see Appendix A - Business Rules "1.1 Enter SAR" for a list of "Category" values that require State Approval.

> To issue service authorizations before 7/1/04, you must use the Generate Requests/ Auths/ Claims in CMS Net.

Notes (margin):

Because only current information is stored for Dental providers, you *may not* be able to enter a retro-active SAR with a dental provider.

Enter SAR Information

The primary & secondary diagnosis default from Patient Registration.

If you wish to change the diagnosis clear the field and type the new code or word and click on the Find button.

14.4 Search for Services for Procedure Code

1. Select the radio button for the appropriate service code: procedure code, service grouping, drugs requiring specific authorization, and medical supplies.
2. Enter search criteria for one of the following: procedure code, service grouping, drugs requiring specific authorization, or medical supplies.
3. Click the "Search" button.

This example shows how to associate a procedure code for a surgery.

Step 1

...vider | Formulary | **Procedure Code** | Administration | Reports

Search – Service Code

○ **PROCEDURE CODE**

Service Code

Description   heart surgery   **Step 2**

You may search for procedure codes to associate to the SAR.

○ **SERVICE GROUPING**

Service Group

Description

○ **DRUGS REQUIRING SPECIFIC AUTHORIZATION**

NDC

Generic Drug Name

Label Drug Name

Service Code Groupings (SCG) can be issued to:
- Medical providers
- Dental Providers
- SCC Providers

Search Medical SCG as 01-07.
Search Dental SCG as S01-S17.

○ **MEDICAL SUPPLIES**

Medical Supply Code

Generic Name

Label Name

Step 3   Search   Clear

Only pharmacy provider types may be issued a SAR with an NDC
- '24' Pharmacy/ Pharmacists

Search Tips:

Searching by a "Code" will return matches that *start with* whatever you type in that field.

Example for Service Code Field:"330"

Returns many matches among others:33010 – Drainage of Heart Sac, 33011 – Repeat Drainage of Heart Sac, 33015 – Incision of Heart Sac

Only medical supply provider types may be issued a SAR for "Medical Supplies:"
- '02' Assist. Dev & sick rooms ply
- '21' orthotists
- '24' pharmacy
- '27' podiatrist
- '29' prosthetists
- '46' rehab clinics

Searching by a "description," returns matches that *contain* whatever you type in that field.

Example for Procedure Code Description Field: "Office Visit"

Returns many matches including: "Office Visit, New, Brief," "Office Visit Limited," and "PostPartum Follow-Up Office Visit."

14.5 Select Services for Procedure Code

1. Check the appropriate service(s) for the SAR.
2. Click the "Continue" button.

> Field descriptions are provided in CMS Net Web Online Help.

14.6 Enter More Service Codes

1. To add another service code (such as a service grouping), click the "Add Services" button.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Enter SAR

FRANCISCO CARLOS CHAVEZ III, 3331366

Required fields are marked in *

CLIENT INFORMATION

Client Name:	FRANCISCO CARLOS CHAVEZ III	**F/R Elig:**	ELIGIBLE	**Reg Status:**	ACTIVE
CCS Number:	3331366	**Med Elig Status:**	ELIGIBLE	**Application Status:**	SIGNED APP
Date of Birth:	02/04/1984	**Diagnostic Only:**	NO	**PSA Status:**	SIGNED
CIN:	97461633C5	**CCS Elig Status:**	9N CCS-M/C ONLY	**Program Begin Date:**	12/18/2002
Gender:	MALE	**County:**	KINGS	**Program End Date:**	12/18/2004

PROVIDER INFORMATION

Provider Name:	TETZLAFF, THOMAS R MD	**Provider Number:**	FS4901334
Address:	75 PRINGLE WAY ,STE 801,RENO,NV,89502-8400	**County:**	

SAR INFORMATION

SAR Number   SAR Status

Service Begin Date * Jul 1 2004   Service End Date Dec 18 2004

Service Request Date * Jun 30 2004   Number of Days

EPSDT-SS ☐   Category Select

CCS SS ☐   State Approved ○ Yes ○ No

State Funded ☐

Primary Diagnosis* 244.9 UNSPECIFIED HYPOTHYROIDISM   find ▶

Secondary Diagnosis   find ▶

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
☐	33310	Select ▾	K		EXPLORATORY HEART SURGERY				

SPECIAL INSTRUCTIONS

Add Services   Submit   Undo

14.7 Search for Services for Service Grouping

1. Select the radio button for the appropriate service code: procedure code, service grouping, drugs requiring specific authorization, and medical supplies.
2. Enter search criteria for one of the following: procedure code, service grouping, drugs requiring specific authorization, or medical supplies.
3. Click the "Search" button.

In this example, we will add a service grouping for a "physician."

Service Code Groupings (SCG) can be issued to:
- Medical providers
- Dental Providers
- SCC Providers

Search Medical SCG as 01-07.
Search Dental SCG as S01-S17.

14.8 Select Services for Service Groupings

1. Check the appropriate service(s) for the SAR. If an <u>exact match</u> is found, the checkbox will be pre-selected.
2. Click the "Continue" button.


```
California Home   CDHS Home   CDHS Comments   CDHS Search   CDHS Organization          Sunday, April 25, 2004

Children's Medical Services                                      Contact Us | Help | Logout
        Caring for Children with Special Medical Needs...

Authorization | Provider | Formulary | Procedure Code | Administration | Reports
Search - Select Services


Select  Service Code      Type        Service Description
  ☑     01                            PHYSICIAN
Found 1-1 out of 1 Matching Records


                         Back    Continue
```

Field descriptions are provided in CMS Net Web Online Help.

14.9 Specify Service Code Information

1. For each service code that appears on the SAR:
   - Check the "Remove" indicator if a code was entered erroneously.
   - Select a Modifier for the Service Code if appropriate.
   - Enter Units. The total number of times a procedure or service is requested. For drug codes: Enter the total number of times the authorized quantity is authorized (for example, a unit of "3" would be the original + two refills).
   - Enter Quantity. Only for NDC drug or medical supply codes. Enter the total number of tablets, capsules, volume of liquid (in mls) or quantity of ointments/creams (in grams) for each dispensing.
   - Enter Amount (only for EPSDT-SS SARs there is no price on file. This field is available to only those with access to update EPSDT-SS SARs.)

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Enter SAR

FRANCISCO CARLOS CHAVEZ III, 3331366

Required fields are marked in *

CLIENT INFORMATION

Client Name:	FRANCISCO CARLOS CHAVEZ III	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
CCS Number:	3331366	Med Elig Status:	ELIGIBLE	Application Status:	SIGNED APP
Date of Birth:	02/04/1984	Diagnostic Only:	NO	PSA Status:	SIGNED
CIN:	97461633C5	CCS Elig Status:	9N CCS-M/C ONLY	Program Begin Date:	12/18/2002
Gender:	MALE	County:	KINGS	Program End Date:	12/18/2004

PROVIDER INFORMATION

Provider Name: TETZLAFF, THOMAS R MD
Address: 75 PRINGLE WAY,STE 801,RENO,NV,89502-8400   Provider Number: FS4901334 County:

SAR INFORMATION

SAR Number   SAR Status
Service Begin Date * Jul 1 2004   Service End Date Dec 18 2004
Service Request Date * Jun 30 2004   Number of Days
EPSDT-SS ☐   Category Select
CCS SS ☐   State Approved ○ Yes ○ No
State Funded ☐
Primary Diagnosis* 244.9 UNSPECIFIED HYPOTHYROIDISM   find ▸
Secondary Diagnosis   find ▸

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
☐	33310	Select	K		EXPLORATORY HEART SURGERY		1		
☐	01	Select			PHYSICIAN		1		

SPECIAL INSTRUCTIONS

Add Services Submit Undo

Field descriptions are provided in CMS Net Web Online Help.

Modifier: "Rental" and "Purchase" selections for "Modifier" should be used for DME & DME accessories only.

"Assistant Surgeon" selection for "Modifier" should **ONLY** be used when the procedure is done separately from the primary physician's authority. It should NEVER be on the same SAR as the surgery that the primary physician is performing.

Units: Units is a required field.

Units: One unit has already been pre-filled for the user for the "Physician" service grouping.

14.10 An Example that Illustrates How to Enter an Alternate Code or an Alternate Description

Certain service codes that are included in the CPT code book are classified as miscellaneous or "by report."

The Branch has a pre-defined selection of miscellaneous or "by report" codes to track and monitor. If you select one of the codes to authorize, you will need to include an alternate code or alternate description to proceed.

An example might look like this:

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
☐	42999	-Select-▼		42975	Throat Surgery Procedure				

Miscellaneous Service Code

There is a valid code (in the newest version of the CPT Code book), but the code is not on the Medical Procedure Master File yet.

If the code for the procedure will (never) be added to the Procedure Master File, the description for the procedure can be documented here.

The page will allow the user to enter either the Alternate Code or the Alternate Description.

The alternate codes and alternate descriptions are used for tracking reports for the Branch.

14.11 Click "Submit" to Complete SAR Entry

1. Perform one of the following actions:
   - Click the "**Submit**" button to save the SAR. The status of the SAR will be "Pending." The user will be taken to the Narrative.
   - Click the "Undo" button to exit from the SAR Entry page. The SAR will not be saved.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Enter SAR

FRANCISCO CARLOS CHAVEZ III, 3331366

Required fields are marked in *

CLIENT INFORMATION

Client Name:	FRANCISCO CARLOS CHAVEZ III	F/R Elig:	ELIGIBLE	Reg Status:	ACTIVE
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Date of Birth:	02/04/1984	Diagnostic Only:	NO	PSA Status:	SIGNED
CIN:	97461633C5	CCS Elig Status:	9N CCS-M/C ONLY	Program Begin Date:	12/18/2002
Gender:	MALE	County:	KINGS	Program End Date:	12/18/2004

PROVIDER INFORMATION

Provider Name:	TETZLAFF, THOMAS R MD	Provider Number:	FS4901334
Address:	75 PRINGLE WAY ,STE 801 ,RENO,NV,89502-8400	County:	

SAR INFORMATION

SAR Number   SAR Status

Service Begin Date * Jul 1 2004   Service End Date Sep 1 2004

Service Request Date * May 1 2004   Number of Days [ ]

EPSDT-SS ☐   Category   Select

CCS SS ☐   State Approved ○ Yes ○ No

State Funded ☐

Primary Diagnosis* 244.9 UNSPECIFIED HYPOTHYROIDISM   [find ▸]

Secondary Diagnosis [ ]   [find ▸]

SERVICE CODE INFORMATION

Remove	Service Code	Modifier	Type	Alternate Code	Service Description	Alternate Description	Units	Quantity	Amount
☐	33310	Select ▾	K		EXPLORATORY HEART SURGERY		1		
☐	01	Select ▾			PHYSICIAN		1		

SPECIAL INSTRUCTIONS

[   ]

[Add Services] [Submit] [Undo]